

**U.S. ENVIRONMENTAL PROTECTION AGENCY**

**DISCOVERY SERVICES**

**RELATIVITY PERMISSIONS, USER APPLICATION ROLES AND  
WORKSPACE WORKFLOWS**

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**Scope**

This document addresses standard operating procedures relating to permissions groups and user application roles inside Relativity. It also addresses the standard workflow employed to create Relativity workspaces.

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## CASE ADMINISTRATOR

Case administrators are granted the highest level of access. Permissions mirror a System Administrator with the exception of rights and roles associated with Relativity Analytics functions.

Below are the general permissions for this group:

- Create and save “saved searches” (and folders)
- Create summary reports
- Create and assign reviewer batches
- Determines review workflow
- Create and execute productions
- Manage folder structure (document & saved search level)
- Establish\monitor reviewer base
- Create custom views
- Create additional layouts
- Create and edit markup sets
- Create additional workspace fields\choices
- Delete workspace documents
- Create and execute imaging jobs
- Create and execute OCR jobs
- Create and edit persistent highlight sets
- Create and edit Search Term Reports
- Coordinate up to project manager

## ADVANCED REVIEWER

Advanced reviewers are granted mid-level access rights. Permissions are heavily limited compared to a Case Administrator but still provide access to perform document review, coding, and saved searching, etc.

Below are the general permissions for this group:

- Code documents
- Redact documents
- Create and save “saved searches” (and folders)
- Coordinate up to case administrator

## BASIC REVIEWER

Basic reviewers are granted low-level access rights. Permissions are heavily limited compared to a Case Administrator but still provide access to perform document review, coding, and saved searching, etc.

Below are the general permissions for this group:

- Code documents
- Redact documents
- Create and execute individual saved searches (do not have the ability to save search criteria)
- Coordinate up to case administrator

## WORKSPACE WORKFLOW

The following is the general workflow followed in the lifecycle of a case:

- Request for workspace creation is communicated to system administrators
- System administrator creates a workspace based off of case type (FOIA, congressional hearing, etc.)
- Case administrators will then be required (if needed) to customize workspace (additional fields, layouts, views, saved searches etc.)
- Documents will then be loaded into the workspace by a system administrator (may be a rolling process)
- Data is then QC'd by a system administrator, and any additional QC steps (summary reports etc.) will be established
- Search indexes will be created/updated (dtSearch) by system administrator
- Additional saved searches will be established by case administrators
- First, second, and final pass review will be completed by review team(s)
- Additional QC done by case administrators prior to production
- Request for document production(s) is communicated to system administrators
- System administrators will export out the produced documents along with any requested metadata.
- Upon completion of review, the workspace/data/search indices are archived and the workspace itself is removed from Relativity (or will remain in the application but will be labeled inactive).